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ABSTRACT

This paper presents organizational strategies and implementation methods for conversion to middle school organization (scheduled to take place in 1988) in the Johnson City, Tennessee, school system. Carried out by the district in partnership with local institutions of higher education, the study focuses on what is educationally best for the child in the middle years of schooling. In 1985, the board of education endorsed the middle school concept and appointed a steering committee to plan implementation. Educational excellence was the primary concern. The school system, anticipating participation by community and employee representatives, organized ideas in four areas: steering committee, program development, staff development, and feedback. The steering committee brought in university resource consultants. The program planning committee investigates the scope of the current curriculum and makes recommendations. Input from teachers and curriculum specialists will be sought. Staff development will involve sessions for questions and demonstration teaching. The paper presents performance evaluations of the steering committee. A work plan for completing the four-phase reform plan by 1988-89 is presented. Information efforts will be a greater priority as the process focuses on such specifics as curriculum preparation, faculty development, student advisement, and transition for a smooth beginning in 1988. (CJH)

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# TRANSITION STRATEGIES AT THE SCHOOL LEVEL:

## Reforming Middle Grades' Organization and Programs

A Paper Presented to

The Southern Regional Council on Educational Administration

Annual Meeting in Atlanta, Georgia

November 1986

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## Introduction

A local reform effort to improve the quality of schooling is underway in the Johnson City, Tennessee local school system. Although initially conceived by district personnel it has become a partnership with the local instituation of higher education, East Tennessee State University's College of Education. The driving force behind this change effort has been the question of "what is educationally best--physically, mentally and emotionally--for the child in the middle years of schooling?"

The Johnson City School System has for a number of years been considering the feasibility of the middle school organizatinal concept: K-5, 6-8, 9-12 grade arrangement that emphasizes the physical, mental, and emotional development of every child, but especially that of the pre-teen early adolescent. In the fall of 1985 the Johnson City Board of Education gave its endorsement to the middle school approach and subsequently approved the appointment of a steering committee to study and plan for implementation of the middle school concept. Educational excellence was to be the primary concern of the committee.

The constant effort to arrange schooling that results in steady development of youngsters' mental and physical capabilities is central to the known success of the Johnson City School System. Overall performance of local students is above the state and national norms on standardized test efforts. However, any substantial improvement of performance results rests on consistent levels of excellence at all grade and school types. Attention to any one school category or type, then, is simply a part of the continuing efforts for increased excellence on the part of the Board of Education and the cadre of professionals operating the daily business of Johnson City's school system. This particular middle school effort has focused on grades six through ten and ages of approximately eleven through fifteen.

Every person who has succeeded in living through the pre-teen and teenage years has a common sense understanding that some things are "different" both physically, mentally, and emotionally during much of this period of growing up. Almost every parent who has survived one or more children through the pre-teen and early teen (or middle) years of school can confirm that the performance of their children in school is not predictable--regardless of any similarities in elementary school performance.

Physicians and psychologists simply confirm from expert points-of-view the common sense evidence about physical, mental, and emotional changes that may be expected and anticipated by any early teen youngsters, their parents, or

any other persons with significant amounts of interaction with this age group, such as teachers and administrators in a school system. A systematic review of alternative approaches available to be used with these young people can only increase our chances for educational success.

The search for more promising avenues of education for youth in the middle years of school has for sometime now focused on the transitional nature of individuals. The term "transescent" was coined to bring increased attention to this time of transition, when changes in anatomy and behavior are often more characterized by their differences than by their similarities.

Practical, immediate concerns also played a major role in undertaking this systematic review of middle level organization. Questions on facility uses and needs provide issues dealing with how to best house students: build new buildings, redistrict to redistribute students from over-populated elementary districts, etc. Another issue is the desirable minimum number of students at Science Hill High School so that a sufficiently broad set of course offering can be maintained. Financial considerations include the fact that particularly attractive bond rates do exist now and likely will not after December 1986.

Other questions of importance included: What program opportunities will increase student performance in academic areas by incorporating materials and activities that are developmentally appropriate? What faculty development will be essential for increased student excellence? What facility modifications ae necessary to accomodate the program plans?

In the spring of 1986 the Johnson City Commission voted to fund the expansion of Science Hill High School to accommodate ninth graders. This paved the way for conversion to the middle school grade organization in 1988.

## Reform Plan

Two aspects of the steps leading to the plan demonstrate the overall philosophy of the Middle School Study:

-The school superintendent indicated that he was committed to the sudy and expected to be involved as needed.

-The responsibility for preparation of the plan was delegated to the management personnel directly involved--Liberty Bell's management team of Principal Beverly Campbell and Assistant Principals Lamar Dean

Charles Hartman, and Dan Stansberry; Supervisor of Secondary Education Dr. Barbara Lawson and Director of Curriculum Joe Allen.

The superintendent's commitment to the study as a priority activity was evidenced by his accessibility, even on short notice, and his requests to the Board of Eduation for essential approvals. Additionally, he arranged for a team of consultants from East Tennessee State University: Dr. Floyd Edwards, Dr. Howard Bowers and Dr. Ernie Bentley.

By October 3, 1985 the initial preparatory plan* was deliberated, modified and approved. Essentials of the study plan are evident:

> This document is based on the assumption that the school system is anticipating various uses of representatives of major community and employee groups to achieve the program modifications. Ideas are organized in four topical areas: Steering committee, Program development, Staff Developmentand Feedback Plans. A list of practical options to get the process moving is attached.
>
> Steering Committee
>
> A Steering Committee composed of representative membership from feeder elementary schools, the current junior high school, the central office and community groups is recommended. Outside consultants from East Tennesse State University would serve as the major resource persons. The consultants would work closely with the committee chairperson to insure that the committee functins efficiently and is able to provide timely recommendations based on valid investigations. Subcommittees will be important for the other three major components of this plan.
>
> This Steering Committee will be responsible for:
>
> (1) Understanding the givens of the proposed modifications as well as the areas where committee input is needed.
>
> (2) Reviewing the status of the program that exists for the grades to be affected by the program modification. This review will involve curriculum, materials and staff.
>
> (3) Gathering information from a variety of sources: faculty concerns and expectations, community concerns and expectations, descriptions of successful middle school programs, experts in the field, site visits.

(4) Reviewing the goals of the school system, the goals for the grades involved in the program modification and specific objectives by subject. It is anticipated that additional goals and objectives may be suggested as program recommendations develop.

(5) Recommending a middle school program that will best serve the Johnson City community based on study of the program that exists and information gathered by the committee.

(6) Assisting in the implementation process in areas such as curriculum writing, materials selection, planning for staff development, giving and receiving feedback.

Program Planning

The Program Planning Committee will have a clear understanding of the goals recommended by the Steering Committee. Scope and sequence of the current curriculum will be investigated and recommendations regarding appropriateness provided. It is assumed that a number of modifications in the current curriculum will be made and that the delivery system will be altered to match these modifications.

This subcommittee would seek extnsive input from teachers at each grade level and from central office persons charged with overseeing curriculum matters. As the new program emerges, the compatible delivery program must be outlined. For example, the committee might recommend a transition school--one in which students will answer to an increasing number of adults as they progress through the program. The beginning grade might be organized using a two-teacher team approach with two teachers responsible for basic subjects for approximately sixty children; the next grade might be organized using a three-teacher team for approximately ninety children; the final grade in the school might be organized much like the high school utilizing subject matter specialists.

Students at each grade level would have the opportunity for instruction by specialist in physical education, the practical arts and the fine arts. Co-curricular programs might begin with intramurals and advance to some more competitive sports events.

Staff Development

A new program is successful only if that program is communicated to staff in a meaningful way. This involves sessions for information giving, time for

questions and concerns, demonstration teaching using the new curriculum and materials and opportunity for practice (Example: the laboratory approach may be a new concept for some teachers.) Teachers, like students, operate at varying levels because of their backgrounds.

In addition to planning to communicate the new program, experiences are needed to address other needs of the staff. The Staff Development Committee will determine these needs by matching backgrounds of current staff to competencies required to deliver the new program. (What do teachers, counselors, administrators need to know to deliver the proposed program?) The committee needs to collect information on staff members' own perceptions of their needs and their supervisors' perceptions of staff needs.

An individual survey instrument for staff members and supervisors is suggested. It is expected that a three-pronged Staff Developoment Program will emerge:

(1) An orientation to the new program for all staff
(2) Courses or workshops to address perceived needs
(3) Graduate programs to further understanding of the pre-adolescent.

Feedback Plans

The Steering committee will be expecting a subgroup to provide guidelines and focus for efforts to keep all groups informed on findings, recommendations and reasoning behind recommendations. All members of the overall committee are responsible for two-way communication roles with the subcommittee intended to be involved in the prepration of feedback instruments and reports to the Board of Education.

The initial task force then prepared a recommended membership format for the Superintendent's consideration and Board approval. It called for a membership of twenty (20) to twenty-five (25) individuals, stated that it should be representative of major community interests, and that the overall plan described above would serve as guidance in Steering Committee activities.

Approval by the Board of Education to organize a Steering Committee to plan and implement the middle school program came on November 4, 1985. On November 6 Joe Allen, Director of Curriculum, distributed formal invitations to twenty-five individuals soliciting their participation in this important activity and on November 12, 1985 Chairperson Beverly Campbell, Principal of Liberty Bell Junior High School, called the first session to order.

Membership was intended to promote "bottom-up" planning as opposed to the "top-down" strategy often encountered in bureaucracies. Individuals represented a variety of expertise and interests. Additionally, three resource individuals were selected to provide outside, objective advice as the committee members did their work. Dr. Ernest Bentley studied with Dr. William Alexander at Peabody College and the University of Florida; Dr. Alexander had been an early supporter of Junior Highs before deciding the name alone was preventing accomplishment of the exploratory, transitional purpose of middle grades schooling. Dr. Floyd Edwards had extensive knowledge and experience with accrediting associations and assessment centers, providing insights into the range of programs now available and staff development aspects of improvement plans; Dr. Howard Bowers added knowledge and experience in facilities as he worked in one of the outstanding facilities laboratories in the country prior to his arrival at East Tennessee State.

Dr. Mike Simmons, Superintendent of Johnson City Schools, gave a brief orientation on the middle school concept and charged the group to work toward what is best for the early adolescent age as the committee move toward an organizational structure for middle school. The Steering Committee then identified questions to be answered and subcommittee topics to serve as organizers for the year's efforts. A calendar was set for progress reports and work plan adjustments.

## Steering Committee Accomplishments

Although the work schedule established was simple and straight forward, the amount of effort required between meetings was true challenge. Beverly Campbell and her management team at Liberty Bell had fulltime responsibilities, yet performed real contributions as chairs of their task forces or committees. Total Steering Committee sessions were scheduled for alternate months. Subcommittees met as often as necessary but were required to meet at least monthly. The variety of work sessions is evident in this review of group meetings:

| DATE | TYPE OF MEETING, PARTICIPANTS, ETC. |
|---|---|
| 9/3/85 | Planning by Consultant Group<br>Simmons, Bentley, Bowers, Edwards |
| 9/26/85 | Discussion of Consultant Group Plan<br>Simmons, Bentley, Bowers, Edwards |
| 10/3/85 | School Administrators & Consultant Group<br>Discussed implementation of Group plan |

| | |
|---|---|
| 10/14/85 | School Administrators & Consultant Group<br>Planned composition of Steering Committee |
| 11/4/85 | Steering Committee was approved by Board |
| 11/12/85 | Initial meeting of Steering Committee<br>Discussed questions to be answered |
| 12/9/85 | Budget planning meeting<br>Bentley, Lawson, Campbell, Allen |
| 12/10/85 | Second meeting of Steering Committee<br>Subcommittee appointments were discussed |
| 12/11/85 | Budget planning meeting<br>Bentley, Simmons, Allen |
| 1/9-10/86 | Planning agenda for Steering Committee<br>Campbell, Bentley |
| 1/14/86 | Third meeting of Steering Committee<br>The functions of subcommittees was discussed |
| 1/24/86 | Budget Planning Meeting<br>Simmons, Bentley, Lawson, Campbell, Allen |
| 1/14-3/15 | Program and Staffing subcommittees met several times.<br>Program subcommittee planned visits to model middle schools. Staffing subcommittee gave orientations to all school faculties and PTA's. |
| 3/4/86 | Planning agenda for Steering Committee meeting<br>Bentley, Campbell |
| 3/11/86 | Fourth meeting of Steering Committee<br>Hear committee reports and discussed plans for school visits. |
| 3/15-5/15 | Visits to 4 model middle schools by approximately 20 people.<br>Most members of the Steering Committee made one visit. |
| 5/13/86 | Planning agenda for Steering Committee meeting<br>Bentley, Campbell |
| 5/20/86 | Fifth meeting of Steering Committee<br>Reports of visits to model schools. |

Five major tasks forces were established based on the priority areas of work: program, students, staff, facilities, and information. Every Steering Committee member served on at least one task force. Beverly Campbell's summary of the overall accomplishments is included here:



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Topics covered at monthly meetings:

I. December:

a. Orientation of group to Middle School with Dr. Paul George's video and NASSP video "Why a School is the Middle".

b. Subcommittees formed
- Program Committee
  Lamar Dean, Chair
- Student Committee
  Miles Barr, Chair
- Staffing
  Dan Stansberry, Chair
- Finance/Facilities
  Charles Hartman, Chair

II. January:

a. Briefing on ASCD Middle School Conference by Beverly Campbell, Joe Allen and Barbara Lawson

b. Subcommittee formed to develop Middle School Philosophy.

III. February:

a. Subcommittee meetings

b. Presentation to elementary school faculties using Dr. Simmons' slide/tape program.

IV. March:

a. Subcommittee Reports
(Refer to Appendixes A1 - A5)

b. Presentation of Middle School Philosophy

V. April:

a. Group visitations to

1. Richview Middle School
   Clarksville, Tennessee
   April 15, 1986

2. Farragut Middle School
   Knoxville, Tennessee
   April 16, 1986

3. Halls Middle School
   Knoxville, Tennessee
   April 16, 1986

4. Five Forks Middle School
   Shiloh Middle School
   Gwinnett County, Georgia
   April 29, 1986

Each team is composed of:
Central Office Personnel
Junior High Administrator
Two Junior High Teachers
Elementary Principal
Two Elementary Teachers
Parent

See Appendix 4 for Protocol for Site Visit.

VI. May:

a. Reports from Visiting Committees

b. Planning for school year 1986-87.

Other Activities:

1. Presentations to the following organizations
   a. Optimist Club
   b. Junior League
   c. Kiwanis
   d. PTA's of Cherokee
      Fairmont
      Henry Johnson
      Liberty Bell
      Northside
      Town Acres
   e. All elementary staff



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Middle School Philosophy. One ad hoc committee was established to draft a comprehensive statement of the Steering Committee middle school philosophy. Its members were a representative from each of the standing committees: Jo Hemphill, Deanna Mauldin, and Henry Joy. Their statement was reported as follows:

MIDDLE SCHOOL PHILOSOPHY

The middle school will be a unique educational entity which provides a guided and gradual transition time from the primary to the secondary level. The main emphasis will be on the educational, social, emotional, and physical growth of the transescent child. It will be a partnership of the educational establishment, the home, and the community.

In the middle school, special attention will be given to developing independence, responsibility, and self-discipline by encouraging students to become self-directing. The student-centered curriculum will provide for individual intellectual capacities of the students by emphasizing the development of a strong academic background in basic skills and by providing varied experiences in the arts and opportunities for athletic development.

Teachers of the middle school will be sensitive to the unique needs of this age child. Teachers will be matched in their areas of expertise to provide the best possible educational experience for all children. They will serve as advisors and role models, inspiring children to reach for goals and challenging them with new ideas.

The middle school will provide a caring, supportive atmosphere, recognizing the individual talents and uniqueness of each student, promoting the joy of learning and acknowledging the worth of each individual. The middle school program will meet each child on his own level and enhance his learning through a positive teacher-student relationship, a challenging curriculum, and an environment that is structured and safe. The ultimate achievement will be the promotion of self-esteem and a sense of belonging for each student.

The Liberty Bell Middle School stands as a community's commitment to its preadolescent children. We are committed to the development of

. . . the intellectual child--believing that ability is virtually limitless;

. . . the physical child--believing a healthy body is a determining factor in an individual's reaching fullest potential;

. . . the emotional child--believing a positive self-concept is a prerequisite for a productive individual;

. . . the spiritual child--believing every child has an initial potential for good;

. . . the creative child--believing every child is unique in his ability to see and feel the world;

. . . the social child--believing that the success of a democratic society relies on the care and concern individual members display toward each other;

. . . the moral child--believing many ethical decisions in an emerging high-technological society will be without precedence.

Field Trips, Lamar Dean's group developed a preliminary review form to identify outstanding middle level programs, conducted a mail survey with telephone follow-up, and arranged for visits by teams to four model schools. Minutes of the March subcommittee reports included several attachments protocol materials, as well as initial survey forms. Joe Allen's summary report of the four visits is helpful in understanding the contribution of these visits:

> Upon the advice of the ETSU consultants the middle school Steering Committee recommended to the superindendent that visits be scheduled to model middle schools during the spring of SY 85-86. After the superintendent had approved and funds had been made available, the program subcommittee of the Steering Committee began preparations for the visits.
>
> Under the direction of committee chariman, Lamar Dean, a list of exemplary middle schools wer identified. The Association of Middle Schools, the ETSU Consultants Group, and other knowledgable persons in the field of middle school education were consulted to compile the lilst. Because of travel costs the list was narrowed to those model schools within a radiu;s of 300 miles of Johnson City. By comparing the data available for the schools on the list it was again narrowed to four middle schools: Richview in Clarksville, Halls in Knoxville, Five-Forks and Shiloh in Gwinnett County, Georgia.
>
> Approximately ten people were identified to make the visit to each school. Nearly all members of the Steering Committee made one of the visits. The schools were contacted and arrangements for lodging and transportation were made. School vans were used for transportation to keep expenses at a minimuim. An observation/report form was designed to serve as a guide for the visit. Care was taken to make certain that all key areas of the school and school program were considered. Team leaders were appointed. These leaders organized each visiting team to ensure that all parts of each model school were considered during the visit.
>
> The visits were made in April and May. After the visit, each team discussed their findings within the team group. Each member then submitted a written report to the team leader following the outline provided. These reports were then compiled and submitted to the Chairperson of the Steering Committee. At the meeting of the Steering Committee on May 20 each team leader reported to the entire group on the highlights of the visit.

A summary of the most important ideas resulting from the visits was compiled. These "lessons learned" will be used in the planning of the Liberty Bell Middle School in Johnson City.

**Performance Evaluations**. Ratings were prepared by nineteen of the twnety-one regular Steering Committee members. Table 1 is a summary of the responses to the objective items.

Table 1

Feedback Sheet

| Question | Agree Completely | Agree Some | Neither | Disagree Some | Disagree Completely |
|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 |
| A. Purpose Clear | 15 | 4 | - | - | - |
| B. Reports Timely | 16 | 3 | - | - | - |
| C. Meetings on Topic | 17 | 2 | - | - | - |
| D. Personally Worthwhile Service | 16 | 2 | 1 | - | - |
| E. Middle School Knowledge Expanded | 15 | 3 | 1 | - | - |
| F. Sub-committee most important Topics | 14 | 4 | 1 | - | - |
| G. Steering Committee Increased Understanding | 15 | 3 | 1 | - | - |

| | Excellent | Very Good | Good | Mediocre | Poor |
|---|---|---|---|---|---|
| Overall Evaluation of Committee Performance | 12 | 7 | - | - | - |

There was consistent belief that the committee functioned at a high level, and displayed more strengths than weaknesses. One recurring improvement theme related to more and better information approaches for the various publics.

## Completing the Reform Plan

A tentative work plan has been projected based on the Steering 1Committee's achievements of the current school year (1985-86) and the actions of the Board of Education in securing approval for facilities additions at Science Hill High School (allowing for change in grade pattersn) and the superintendent's announcement of an anticipated program implementation target date of September 1988. The phases that have been outlined are:

PHASE I: PLANNING (August 1986--May 1987

1. Faculty education
   - Open forum
   - Personal Profile seminar

2. Steering Committee Activities
   - Action recommendations to functional subcommittees
   - Monitor and assess progress of functional subcommittees

3. Middle School Development Steering Committee meeting dates for SY 1986-87
   - September Thurdsay, September 25 3:30-5 p.m.
   - November Wednesday, November 19 3:30-5 p.m.
   - January Wednesday, January 28 3:30-5 p.m.
   - March Wednesday, March 25 3:30-5 p.m.
   - May Wednesday, May 13 3:30-5 p.m.

4. Progress report to Board of Education and faculty
   - Status
   - Milestones

5. Functional subcommittees and task force structure
   -Personnel: evaluate faculity qualifications
   design staff development education
   morale
   - Facilities and transportation
   - School programs
   - Student requirements
   - Communication
   - ETSU Middle School Course: ETSU course will focus on practical needs of content, guides, materials, techniques, etc.

6. Functional subcommittees will meet formally on alternate months from the Steering Committee. This is a minimum requirement.

7. Field research

- Follow-up visits
- Personnel qualifications

8. Communication strategies
   - Board of Education
   - Genral public
   - Parent body
   - Student body
   - Faculty

9. Functional subcommittees submit recommendations

10. Steering Committee
    - Receive recommendations
    - Assess recommendations

PHASE II; STAGE A--DEVELOPMENT (August 1987--March 1988)

1. Implementation procedural manual developed by functional subcommittee

2. Steering Committee review of procedural manual draft

PHASE III; STAGE B--TRAINING FOR IMPLEMENTATIOn (April 1988--May 1988)

1. Define personnel requirements (School organizational chart)

2. Professional development
   - ETSU course on middle school pre-adolescent
   - Seminars
   - Procedural Manual

3. Establish communication channels
   - Elementary school staffs
   - Parents
   - Children
   - General community

PHASE IV; STAGE C--IMPLEMENTATION (August 1988-----)

1. Orientation activities (parents, teachers, students)

2. Regular schedule begins

3. Monitor implementation process

4. Continuing faculty development

5. First year review (May 1989)

A major strategy in each phase will be expanded participation opportunities for teachers, administraive personnel, and other affected groups. Information efforts will be a greater priority as progress now becomes focused on specifics such as curriculum preparation, faculty development, administrative organizational patterns, student advisement, exploratory opportunities for studentrs, facilities modifications, and transition activities for a smooth beginning ln 1988.

# MIDDLE SCHOOL

## IMPLEMENTATION ORGANIZATION